

# The Power of PowerLink Part 2

Cards, Card Files, Workbenches, Presentation Schemes

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# Session Topics

- Cards
- Card Files
- Workbenches
- Workspaces
- Presentation Schemes in a View
- Quick Change
- Export Options

# Cards & Card Files

# Cards & Card Files

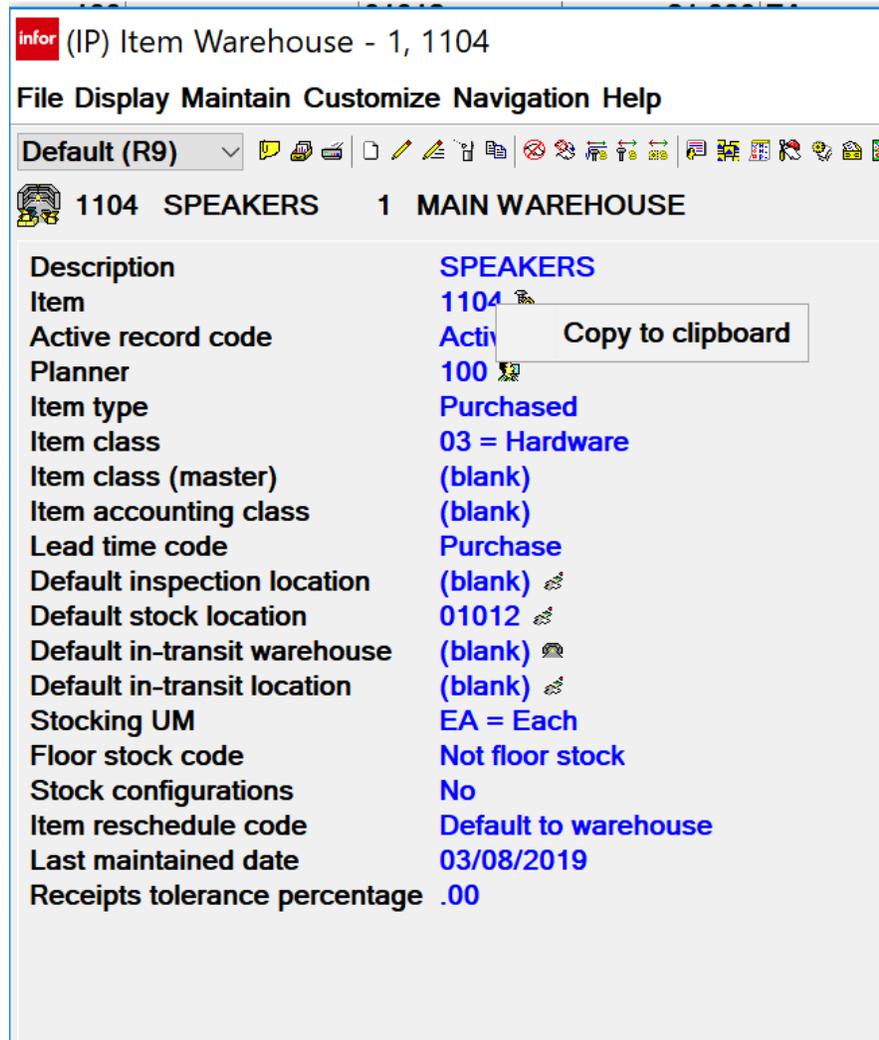
- Cards hold information/data
  - 7 different types of cards
- Card Files hold cards



# Card types

- *Attribute* – holds/displays fields
- *List* – List of records in an associated file controlled by View, Subset and Sort
- *Overview* – Icons display information about the file with drill down capabilities
- *Graph* – For numeric data (i.e. costs) bar, pie or line graphs
- *Tabbed* – holds other cards (not available for Compound section)
- *Compound* – up to 4 sections displaying information about the item
- *Related* – can bring in cards from related files

# Attribute Card



Attribute	Value
Description	SPEAKERS
Item	1104
Active record code	Activ
Planner	100
Item type	Purchased
Item class	03 = Hardware
Item class (master)	(blank)
Item accounting class	(blank)
Lead time code	Purchase
Default inspection location	(blank)
Default stock location	01012
Default in-transit warehouse	(blank)
Default in-transit location	(blank)
Stocking UM	EA = Each
Floor stock code	Not floor stock
Stock configurations	No
Item reschedule code	Default to warehouse
Last maintained date	03/08/2019
Receipts tolerance percentage	.00

- Attribute cards are primarily used for entry, maintenance and inquiry
- Define the fields to display on the card
  - Can create blank lines/subject headings
  - Can insert column breaks
- Right click on a field in an attribute card to copy the field value to your clipboard
  - In the example here, 'Item' field was added twice so that the item number could be copied then pasted

# List Card

infor (IP) Item Warehouse - 1, 1105

File Display Maintain Customize Navigation Help

Default (R9)

1105 MOUSE 1 MAIN WAREHOUSE

Posted	Txn	Order	Quantity	UM	New on-hand	New on-order	New allocated	FIFO
03/08/2019	IA = Adjust Item Qu...		-360.000	EA	7,670.000	0.000	135.000	01/30/1998
03/08/2019	IA = Adjust Item Qu...		-43.000	EA	8,030.000	0.000	135.000	01/30/1998
03/08/2019	IA = Adjust Item Qu...		4.000	EA	8,073.000	0.000	135.000	03/08/2019
03/08/2019	IA = Adjust Item Qu...		360.000	EA	8,069.000	0.000	135.000	01/30/1998
03/08/2019	PH = Adjust Item Q...		43.000	EA	7,709.000	0.000	135.000	01/30/1998
03/08/2019	PH = Adjust Item Q...		-4.000	EA	7,666.000	0.000	135.000	07/21/2016
03/08/2019	PH = Adjust Item Q...		-360.000	EA	7,670.000	0.000	135.000	01/03/2019
03/08/2019	IA = Adjust Item Qu...		43.000	EA	8,030.000	0.000	135.000	01/30/1998
03/08/2019	IA = Adjust Item Qu...		-4.000	EA	7,987.000	0.000	135.000	03/08/2019
03/08/2019	IA = Adjust Item Qu...		-360.000	EA	7,991.000	0.000	135.000	01/03/2019
03/08/2019	PH = Adjust Item Q...		-43.000	EA	8,351.000	0.000	135.000	01/30/1998
03/08/2019	PH = Adjust Item Q...		4.000	EA	8,394.000	0.000	135.000	07/21/2016
03/08/2019	PH = Adjust Item Q...		360.000	EA	8,390.000	0.000	135.000	01/03/2019
03/05/2019	SA = Issue Sales It...	1-CO 13318	10.000	EA	8,030.000	0.000	135.000	01/16/2019
01/17/2019	RW = Receive Tran...		5.000	EA	8,040.000	0.000	110.000	
01/17/2019	IW = Issue Transfer...		5.000	EA	8,040.000	0.000	110.000	
01/17/2019	TW = Transfer Item		5.000	EA	8,040.000	0.000	0.000	
01/17/2019	SA = Issue Sales It...	1-CO 13298	2.000	EA	8,040.000	0.000	110.000	01/16/2019
01/17/2019	SA = Issue Sales It...	1-CO 13298	3.000	EA	8,042.000	0.000	112.000	01/16/2019
01/17/2019	RW = Receive Tran...		2.000	EA	8,045.000	0.000	115.000	
01/17/2019	IW = Issue Transfer...		2.000	EA	8,045.000	0.000	115.000	
01/17/2019	TW = Transfer Item		2.000	EA	8,045.000	0.000	0.000	
01/17/2019	RW = Receive Tran...		3.000	EA	8,045.000	0.000	115.000	
01/17/2019	IW = Issue Transfer...		3.000	EA	8,045.000	0.000	115.000	
01/17/2019	TW = Transfer Item		3.000	EA	8,045.000	0.000	0.000	
01/16/2019	RW = Receive Tran...		5.000	EA	8,045.000	0.000	115.000	
01/16/2019	IW = Issue Transfer...		5.000	EA	8,045.000	0.000	115.000	

Item Characteristics
Stock Status
Stock Movement
Stock Financial
Unit Cost(s)
Order Sizing
Requirements Mgmt
Mfg Lead Times
Pur Lead Times
Purchasing
Master Scheduling
Cycle Count
Repetitive
Item Warehouse Overview
Tran History

- A list card has all the same control elements (view, subset and sort) as an object list
- Most under-used card type
- You can right click on a column heading to create a temporary subset
- You can add totals and/or count to your columns



# Compound Card

Item Warehouse - 1, SP574705

File Display Maintain Customize User Navigation Help

Default (R9)

SP574705 SPRING COMPRESSION .670 ID X 2.5L 1 QPOLE MN 1

Item **SP574705** PO's

Quantity on-hand **177.000**

On Order:  
MO Quantity **0.000**  
PO Quantity **150.000**

Requirements  
MO Allocation **99.000**  
CO Allocation **8.000**

Total available **220.000**

Order	Order	Rec'd Stock	Open qty	Stk UM	Stock	Scheduled qty	Status	Extended description 1
P457639	150	0	150	EA	04/09/2018	150.000	10 = ...	S-408 CENTURY

Customer Orders:

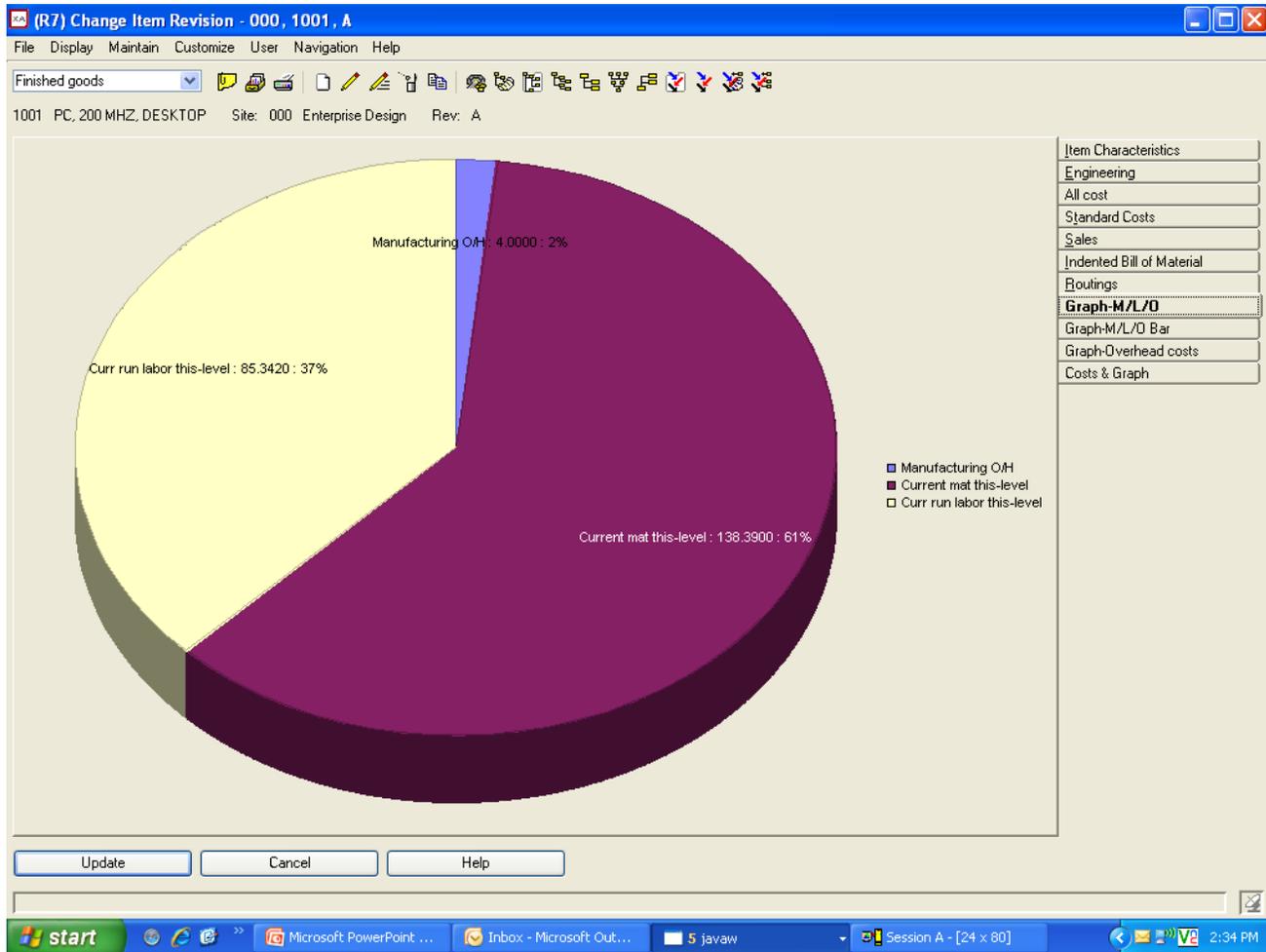
Order	Order qty	Shipped	Remaining	UM	Mfg due	Backor
82022	4	0	0	EA	04/16/2018	0.0
81916	4	0	0	EA	04/06/2018	0.0

MO's

Order	Status	Order Qty	Received	Scrap Due
-------	--------	-----------	----------	-----------

- Compound cards can have between 2 and 4 sections to the card
- Sections can be defined as:
  - Attribute
  - List
  - Graph
  - Overview
- You can define your own section or insert a pre-existing card

# Graph Card



- Graph style is defined when creating the card:
  - Bar
  - Line
  - Pie
- Fields selected for the graph must be numeric
- Legend and field description are optional

# Overview card

infor (PG) Bill of Material -

File Display Maintain Customize Navigation Help

Indented Bill of Material

0523 G614 A/L EXT COMP-MPB, CBP, Site: BRI BRISTOL Rev: Alt:

Details: Engineering S-no (none) Effective (today) Required quantity (SBQ) Refresh

Identification	Comps	Req	Qty per	Oper	LT adj	LT method	Impl ...	Drawing	Effective
0523 G614 A/L EXT COMP-MPB, CBP, Rev: Alt:	18	1.000	SBQ: 1.000				(ALL)	0	01/01/1940 -
148412 THERMALLY PROTECTED LABEL Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
148686 COMPRESSOR WARNING LABEL Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
201227 G - SELF TAPPING HEX WASHER Rev: Alt: Seq:		4.000	4.000		0.0	Due date	(ALL)		-
202066 PHILLIPS/SLOT HEX WASHER HEAD Rev: Alt: Seq:		3.000	3.000		0.0	Due date	(ALL)		-
225023 G - TERMINAL COVER GASKET Rev: Alt: Seq:	1	1.000	1.000		0.0	Due date	(ALL)		-
228052 G - LARGE TERMINAL BOX COVER Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
241096 G - CONNECTOR BLOCK (95 AMPS) Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
241353 G - MODULE WIRE (PARALLEL SENS Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
241706 G - CCH, 95W,460V, CH-147-7 Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
241771 115/230V KRIWAN MODULE Rev: Alt: Seq:	1	1.000	1.000		0.0	Due date	(ALL)		- 09/07/2014
241816 G - 120/240V KRIWAN MODULE, Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		09/07/2014 -
242106 A B & G TIE WRAP, 8 LG Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		-
248058 G (H2*G614) - WIRING LABEL, Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		07/31/2014 -
248512 G (H25 & H2NG 614) - WIRING Rev: Alt: Seq:		1.000	1.000		0.0	Due date	(ALL)		- 07/31/2014
309015 G - BULK MOUNTING PARTS ASSEMB Rev: Alt: Seq:	2	1.000	1.000		0.0	Due date	(ALL)		-
516015 G - BULK NONR PACK ASSEMBLY Rev: Alt: Seq:	11	0.200	0.200		0.0	Due date	(ALL)		-
530108 SINGLE PACK KIT IDENTIFICATION Rev: Alt: Seq:		0.000	0.000		0.0	Due date	(ALL)		-
582001 RTV103 SILICONE RUBBER Rev: Alt: Seq:		0.147	0.147		0.0	Due date	(ALL)		-

Highlight inactive components Omit inactive components

Continue Help

- Overview cards display information but don't allow for entry/maintenance
- Setting in the card definition along with your preferences define how many levels are open in the card
- Used for indented BOM, orders and inventory

# Overview Card Options – Power Expand

The screenshot shows the 'infor (PG) Edit Bill of Material Overview' window. The 'Options' tab is selected and highlighted with a blue box. The 'Power Expand levels' field is also highlighted with a blue box. The window contains the following fields:

Field	Value
Name	Indented Bill of Material
Domain	Public
Security	(none)
Initial expand levels	1
Power Expand levels	(preference)
Initial identification column width	450

Buttons at the bottom: Save, Save as ..., Cancel, Help.

- Power Expand will open the card already exploded. i.e. you will NOT have to click on each + to open a level of the BOM
- Can enter a number (for number of levels), 'All' or 'Preference' (uses the Preference in the PowerLink Preferences (Miscellaneous card))

# Tabbed Card

infor (IP) Item Warehouse - 1, 1105

File Display Maintain Customize Navigation Help

Default (R9)

1105 MOUSE 1 MAIN WAREHOUSE

Lead time code	Purchase
Standard	0.0
Variable	0.0
Adjustment	0.0
Average	32.0
Cumulative	0.0
Cumulative material	0.0
Standard lot size	0.000

Item Characteristics

Stock Status

Stock Movement

Stock Financial

Unit Cost(s)

Order Sizing

Requirements Mgmt

Mfg Lead Times

Pur Lead Times

Purchasing

Master Scheduling

Cycle Count

Repetitive

Item Warehouse Overview

Tran History

Lead Time

Mfg Lead Times Pur Lead Times

Continue Help

- A Tabbed card holds other cards
- Tabs display at the bottom



# Related Card

infor (IP) Item Warehouse - 1, 1104

File Display Maintain Customize Navigation Help

Default (R9)

1104 SPEAKERS 1 MAIN WAREHOUSE

Location 01012

Type STOCKING-MAIN  
Description (blank)  
Multiple items Yes  
Multiple lots Yes  
Allow negative on-hand Use warehouse setting  
Inventory status (blank)  
Empty No

Item Characteristics  
Stock Status  
Stock Movement  
Stock Financial  
Unit Cost(s)  
Order Sizing  
Requirements Mgmt  
Mfg Lead Times  
Pur Lead Times  
Purchasing  
Master Scheduling  
Cycle Count  
Repetitive  
Item Warehouse Overview  
Tran History  
Lead Time  
Loc

Location Items

Item	Batch/lot	FIFO	On-hand	Stk UM	QC status
1000		01/14/2019	8	EA	Approved, no shelf life
1001		01/14/2019	70	EA	Approved, no shelf life
1104		01/30/1998	10,649	EA	Approved, no shelf life
1105		01/30/1998	7,943	EA	Approved, no shelf life
1106		05/30/2014	9,788	EA	Approved, no shelf life
1107		01/11/2019	9,830	EA	Approved, no shelf life
1108		05/30/2014	80	EA	Approved, no shelf life
1109		02/09/2007	49,980	EA	Approved, no shelf life

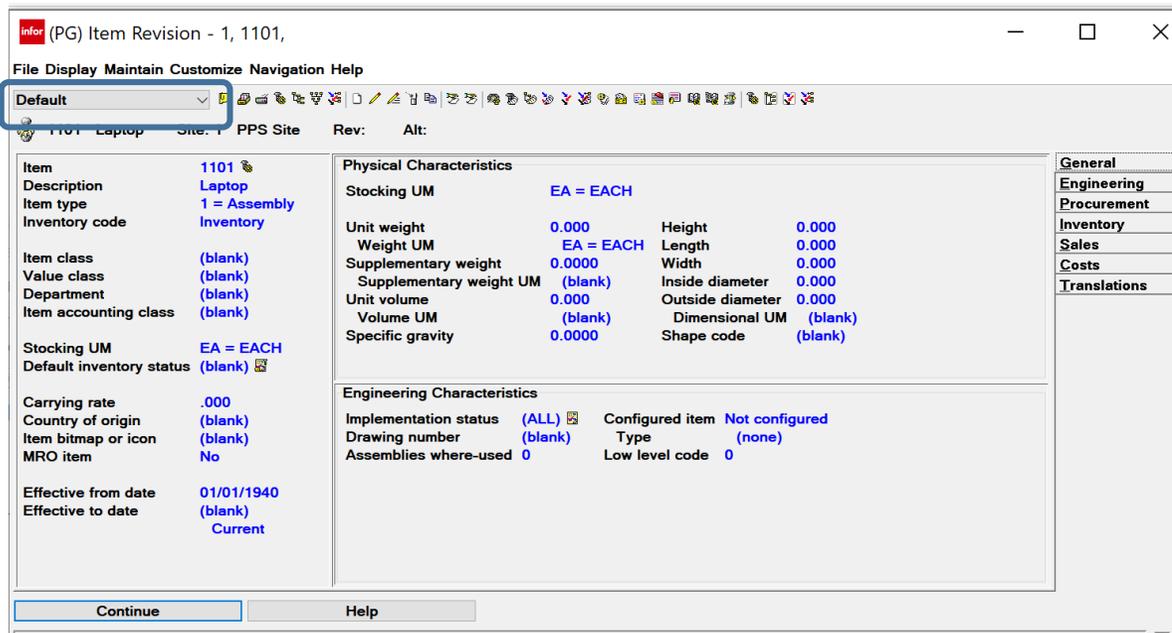
Continue Help

- Related cards will display information from other files associated with the primary file

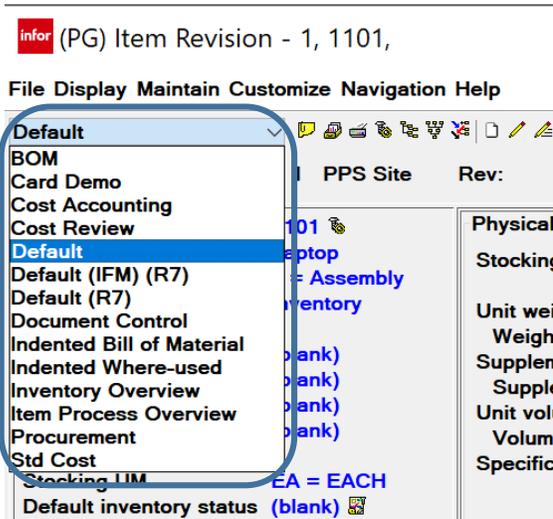
All items in location 01012

# Card Files

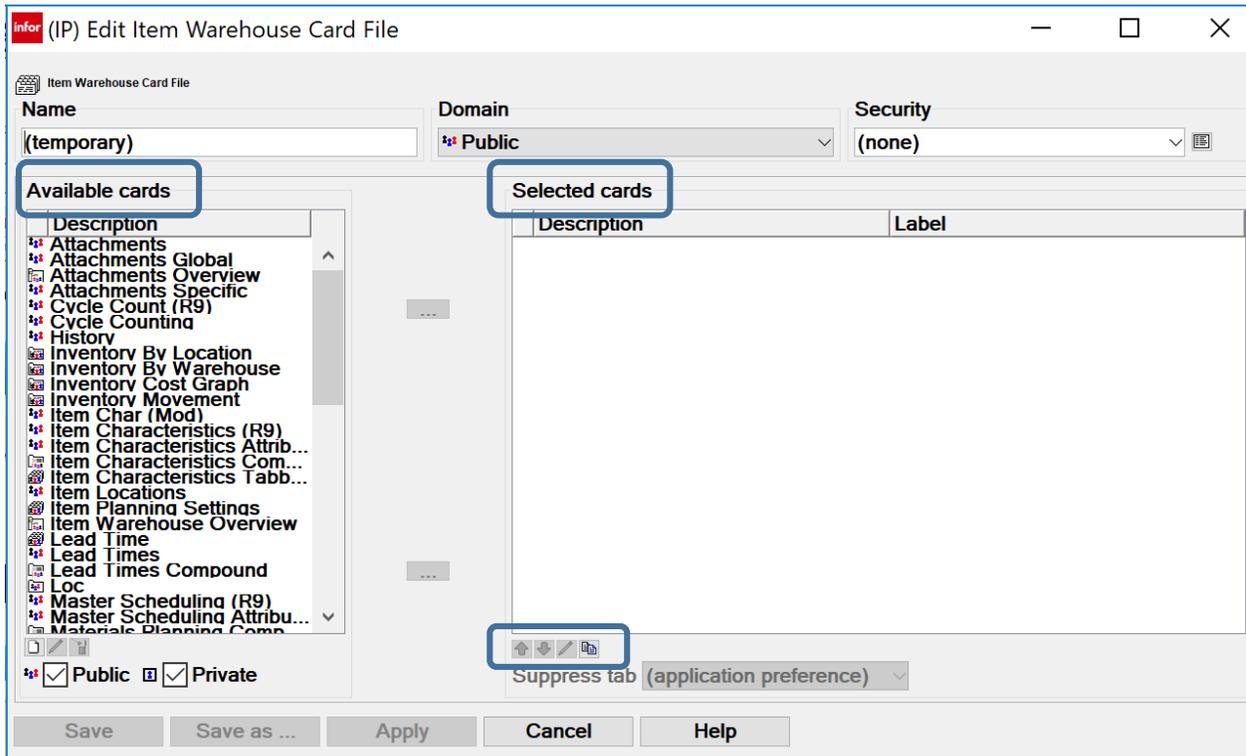
# Card files



- After opening a card file, you can use the pull down in the upper left corner to change the card file
  - Different card files will display different cards
  - Can customize card files for different departments/information requirements
- In each object's preferences, there is a 'card file' option that will allow you to default the card file that you use most



# Card files



- A Card File holds a group of cards (the tabs will tell you which cards are in a Card File)
- After creating a card it must be added to a card file in order to use/view the card
  - If you click the 'Apply' button after creating a new card, a pop up window will display asking 'Do you want to add the card to the existing card file?'
- The same card can be added to multiple card files

# Workbenches

# Workbench Overview

- With a Workbench, you can click on a record in one window and send that item/order to other windows providing multiple inquiries with a single click
- For example, from the Item Warehouse record, you could show:
  - Item Locations
  - Transaction History
  - Scheduled PO and MO receipts
- It's possible to have one workbench inside another workbench, for example
  - In the description above, the MO window could update the MO Components List and MO Operations
- Functionality in PowerLink is
  - Broadcast (from the originating window)  
  - Receive (other windows)  
- Once the Broadcast/Receive functions have been enabled and tested, you can save the entire set up as a Workbench

infor (A1) Item Warehouses

File Display Maintain Customize User Navigation Help

Stk Status \*Stk Status

Item Warehouses

Whs	Item	Description	Stk UM	I/T	LT	On-hand	MO Alloc	CO Alloc	MO Qty	PO Qty	Available	Vendor	Buyer
100	AC21-30	MECHANICAL CONTROL	EA	3	P	10	0	21	0	0	-11	G7742A	X
888	AC21-30	RECLINE CABLE	EA	3	P	36	82	0	0	70	24	G7742B	CHI5
100	AC21-30 F	MECHANICAL CONTROL	EA	3	P	49	0	0	0	0	49	G7742A	X

Default Stock Location BFE ITM LOC. & PO

Count Cycle Count Entry Raw M

infor (A1) Item Locations

File Display Maintain Customize User Navigation Help

Stk Status \*(all records)

The broadcasting Item Warehouse list does not have a valid selection. Please select a valid Item Warehouse from the broadcasting list...

Whs	Location	On-hand	Inventory status

infor (A1) Scheduled Receipts

File Display Maintain Customize User Navigation Help

Stk Status \*Open

The broadcasting Item Warehouse list does not have a valid selection. Please select a valid Item Warehouse from the broadcasting list to continue.

Order	Open qty	Stk UM	Scheduled qty	Status

infor (A1) M.O. Components

File Display Maintain Customize User Navigation Help

Stk Status \*(all records)

The broadcasting Item Warehouse list does not have a valid selection. Please select a valid Item Warehouse from the broadcasting list to continue.

MO #	Req QTY.	ISS QTY.	UNISSUED	Iss Date	Req Date

infor (A1) C.O. Line Items

File Display Maintain Customize User Navigation Help

Stk Status \*(all records)

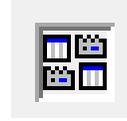
The broadcasting Item Warehouse list does not have a valid selection. Please select a valid Item Warehouse from the broadcasting list to continue.

Customer	Order	Quantity	Shipped	Remaining	M.O. number	UM	Promise	Mfg due

RMS Receiving Cycle Count BFF



# Right click on Workbench button



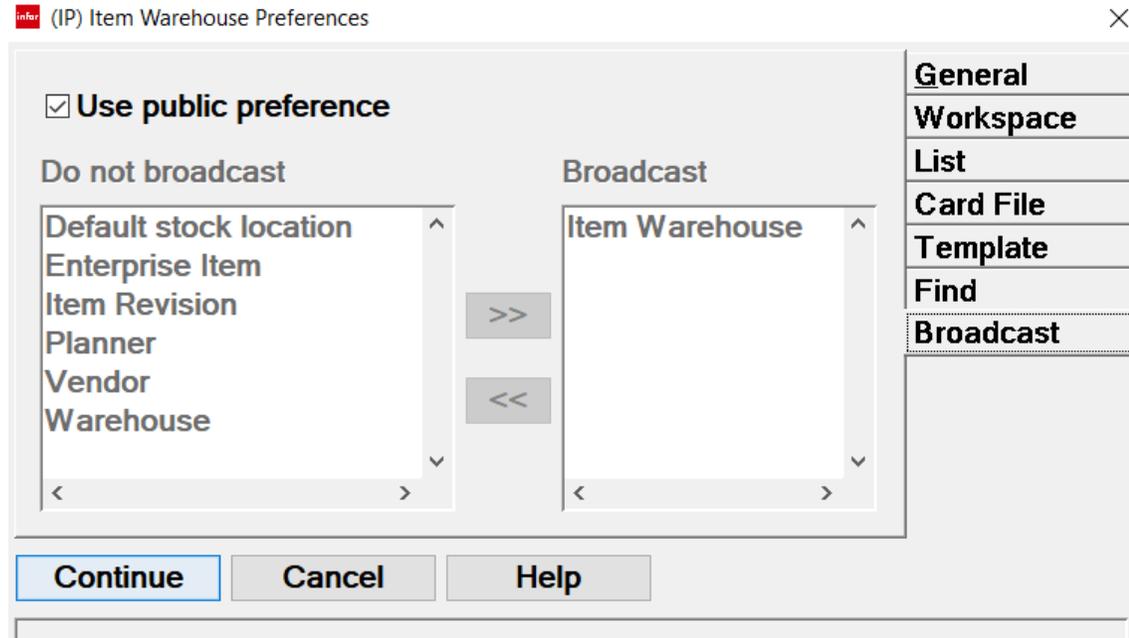
The screenshot shows two windows from the Infor software. The main window is titled '(IP) Vendors' and displays a table of vendor information. The second window is titled '(IP) Vendor Item:' and displays a list of items. A right-click context menu is open over the 'Workbench' button in the bottom right corner of the main window. The menu options are: Restore Workbench, Minimize Workbench, Close Workbench, Cancel, and Help. The 'Workbench' button and the context menu are highlighted with a red circle.

Vendor	Name	Assignee	Allow P.O.	Allow payments	Suspend P.O. entry	Sus
AAAAAG	Beach Lake Materials	AAAAAG	Yes	Yes		
P0022	MedVet Parts Department	100022	Yes	Yes		Yes
P00233	Berkshire Corp.	10023	Yes	Yes		Yes
S0022	MedVet Equipment Sales Department	100022	Yes	Yes		Yes
S00231	Simmons Wheeler	10023	Yes	Yes		Yes
000000						Yes
1	Aerospace Alloys	1	Yes	Yes		Yes
10	IBM - Mexico	10	Yes	Yes	Yes	
100	Hi Tech Corp	100	Yes	Yes		
100022	MedVet	100022	Yes	Yes		
10023	Sherwin Grant	10023	Yes	Yes		
107650	Americas Supply	107650	Yes	Yes		
11	Radio Shack US Global	600	Yes	Yes		
12339	Honeywell	12339	Yes	Yes		Yes
14	Intel Corporation	14	Yes	Yes		
1429	BELLERIVE KA"N"ENDA INC	1429	Yes	Yes		
16	Sony Electronics - Japan	16	Yes	Yes		
17	Intel Europe	17	Yes	Yes		
19	Roccla	19	Yes	Yes		
20	Power Connections - France	20	Yes	Yes		
200	Joe	200	Yes	Yes		
2252	COMMERCIAL SAND SUPPLY	2252	Yes	Yes		
2340	COLUMBIA CONCRETE PRODUCTS	2340	Yes	Yes		
2358	COMMONWEALTH PLYWOOD LTD	2358	Yes	Yes		
27120	PACIFIC VENEER LTD	27120	Yes	Yes		
2799	DIETRICH VENEER SALES	2799	Yes	Yes		
2915	DONGWHA PATINNA NZ LTD	2915	Yes	Yes		
29729	WEYERHAUSER COMPANY	29729	Yes	Yes		
3	Radio Shack - Mexico City	3	Yes	Yes		
30	Riverside Tractor parts	30	Yes	Yes		
300	HI TECH MEXICO	300	Yes	Yes		
31000	Measuring Devices Vendor	31000	Yes	Yes		
3210	EVERGREEN HARDWOODS INC	3210	Yes	Yes		
37842	Arkema Inc	37842	Yes	Yes		Yes
3795	GOODMAN VENEER & LUMBER CO	3795	Yes	Yes		
4	MAPICS, Inc	4	Yes	Yes		
40	GE Capital, Inc	40	Yes	Yes		
400002	Brainger, Inc	400002	Yes	Yes		Yes
400003	Industrial Supply Int'l	400003	Yes	Yes		Yes
40001	Steel Products USA	40001	Yes	Yes		
40002	Brainger, Inc	40002	Yes	Yes		
40003	Industrial Supply Int'l	40003	Yes	Yes		
40005	Industrial Supply Int'l	40005	Yes	Yes		

- Right click on the 'Workbench' symbol to bring up options
  - Minimize workbench
  - Restore workbench
  - Close workbench

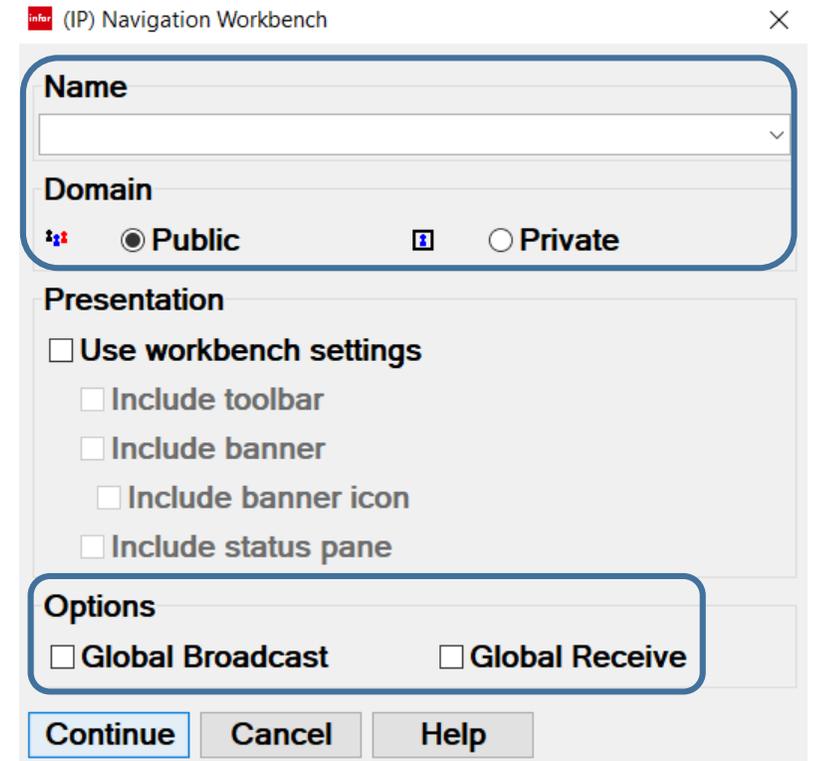
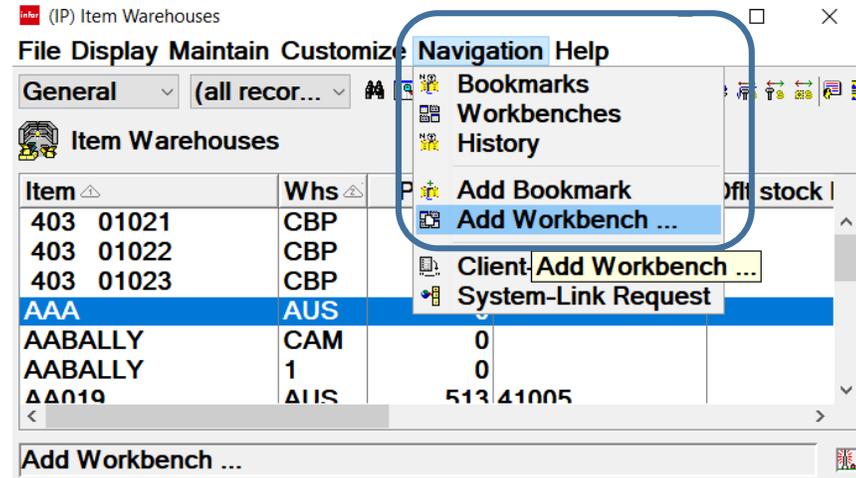
# Workbench tips

- If you've turned on Broadcast and Receive on 2 windows and the receiving window is not updating, check your 'Preferences' in the Broadcast window
- On the 'Broadcast' tab, uncheck 'Use Public Preferences' and add all the files on the left side of the card to the 'Broadcast' section:



# Save/Name a Workbench

- Verify that there are no windows open except the ones in your workbench then click:
  - Navigation
  - Add Workbench
- Give the Workbench a name, public or private
- 'Global' means that other windows not in workbench can broadcast or receive if needed for a temporary session

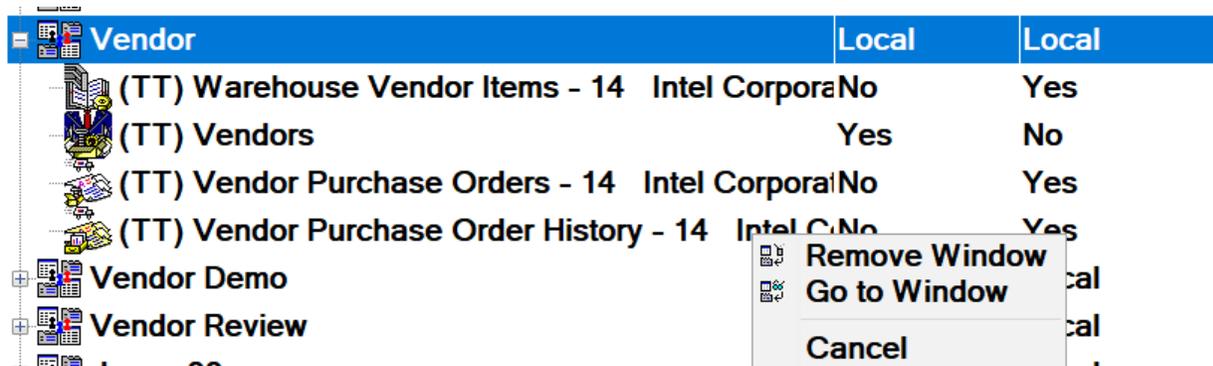


# Change a Workbench

- There is **no option** to 'Change' a workbench
- Open the workbench and:
  - Add or close windows
  - Change the size or position of the windows
  - Change the view, subset, sort, card file, active card, etc.
- Click on 'Navigation' then 'Add Workbench'; leave the name the same and it will overwrite the existing workbench with your changes (a warning will be displayed)

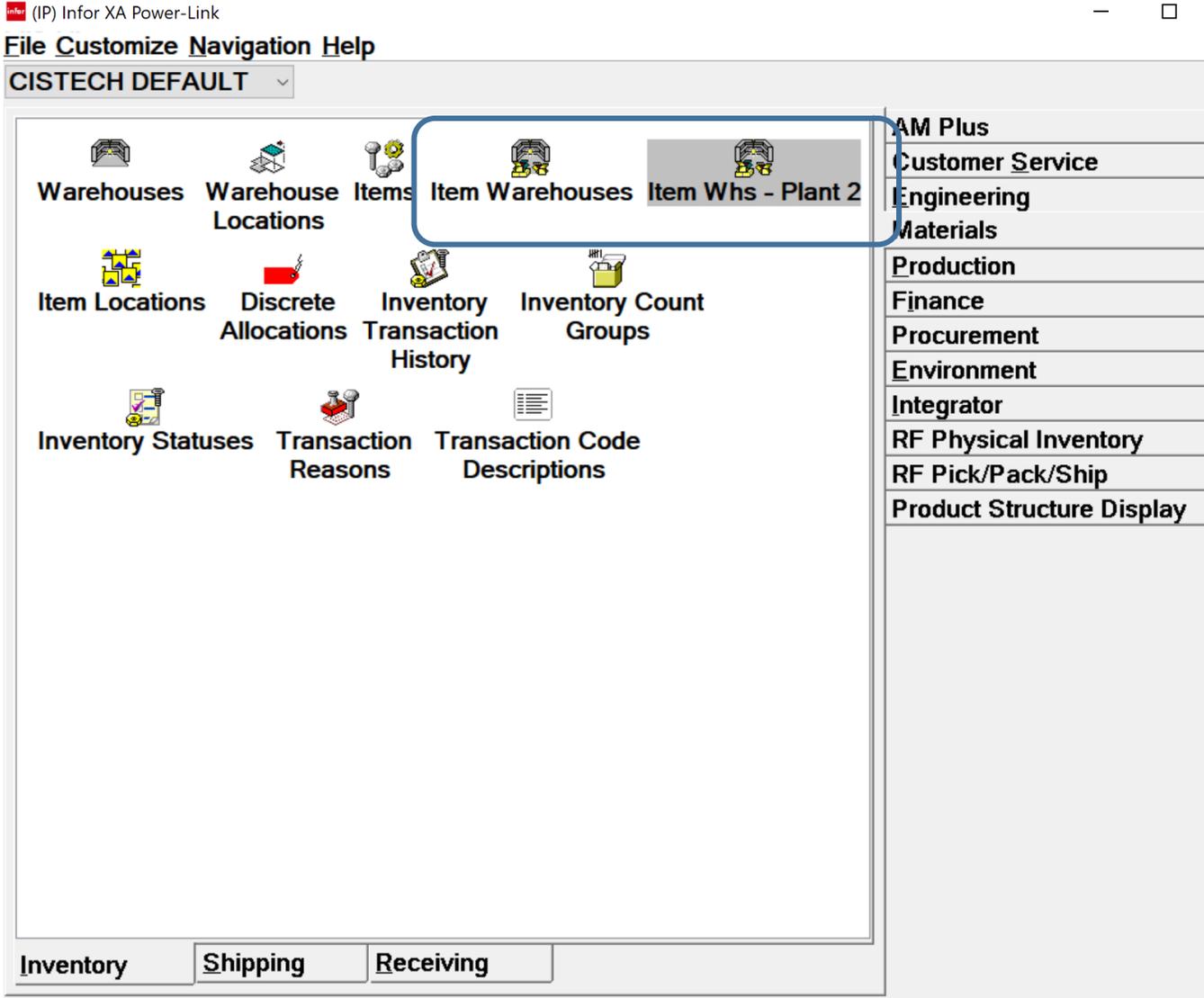
# Remove Windows from an existing workbench

- Click on 'Navigation' (from any window) and select 'Workbenches'
- A list of existing workbenches will be displayed
- To open a workbench, double click on the + to the left of the name
- To Remove a window from a workbench:
  - Click on the + sign to the left of the workbench name; a list of windows will be displayed
  - Right Click on the window you want to remove from the workbench and select 'Remove Window'



# Workspaces

# Workspaces



- Workspaces allow for the same object to be added multiple times to a main card file card but have different subsets, views and sorts.
  - Customize the toolbar
  - Change the card file that opens when you double click on a line in the list
- Helpful if you have multiple plants and want each plant to only see their information
- Typically set up and maintained by IT Department

# Workspace

Application Card

Name: Materials Management Inventory

Domain: Public

Security: (none)

Card properties

Tab label: &Inventory

Available objects

Description
Item Price Details
Item Processes
Item Revision Base Prices
Item Revision Foreign Lanqua...
Item Revision Foreign Prices
Item Revisions
Item Sales Families
Item Sales Groups
Item Tax Classes
Item UM Conversions
<b>Item Warehouses</b>
Items
Journal Types
Labor Activity History Transac...
Labor Activity Transactions

Selected objects

Description	Label
Warehouses	Warehouses
Warehouse Locations	Warehouse Locations
Items	Items
<b>Item Warehouses</b>	<b>Item Warehouses</b>
Item Locations	Item Locations
Discrete Allocations	Discrete Allocations
Inventory Transaction...	Inventory Transactio...
Inventory Count Grou...	Inventory Count Grou...
Inventory Statuses	Inventory Statuses
Transaction Reasons	Transaction Reasons
Transaction Code De...	Transaction Code De...

Save Save as ... Apply Cancel Help

- In the 'Selected Objects' window, you can see Item Warehouses is already on the card
- In the 'Available Objects' window, you can double click on Item Warehouses to add it again to the card

# Workspaces

(IP) Application Card Attribute Definition ×

Label

Icon name

Workspace  

- Change the 'Label' to something more descriptive of the content (i.e. Plant #2)
- Click on the button to the right of the Workspace field to create a new workspace
- A list of the existing workspaces will be displayed, click on the 'create' button to add a new workspace

# Workspaces – Presentation Tab

(IP) Item Warehouse Workspace

Item Warehouse Workspace

Name: Plant 2

Domain: Public

Security: (none)

Presentation | Menu | List | Card File | Template | Find | Broadcast

List

List title: Item Whs - Plant 2

Large list icon name: ITMWHS-O32.GIF

Object

Object title: Item Warehouse

Object title message: Message

Large object icon name: ITMWHS-O32.GIF

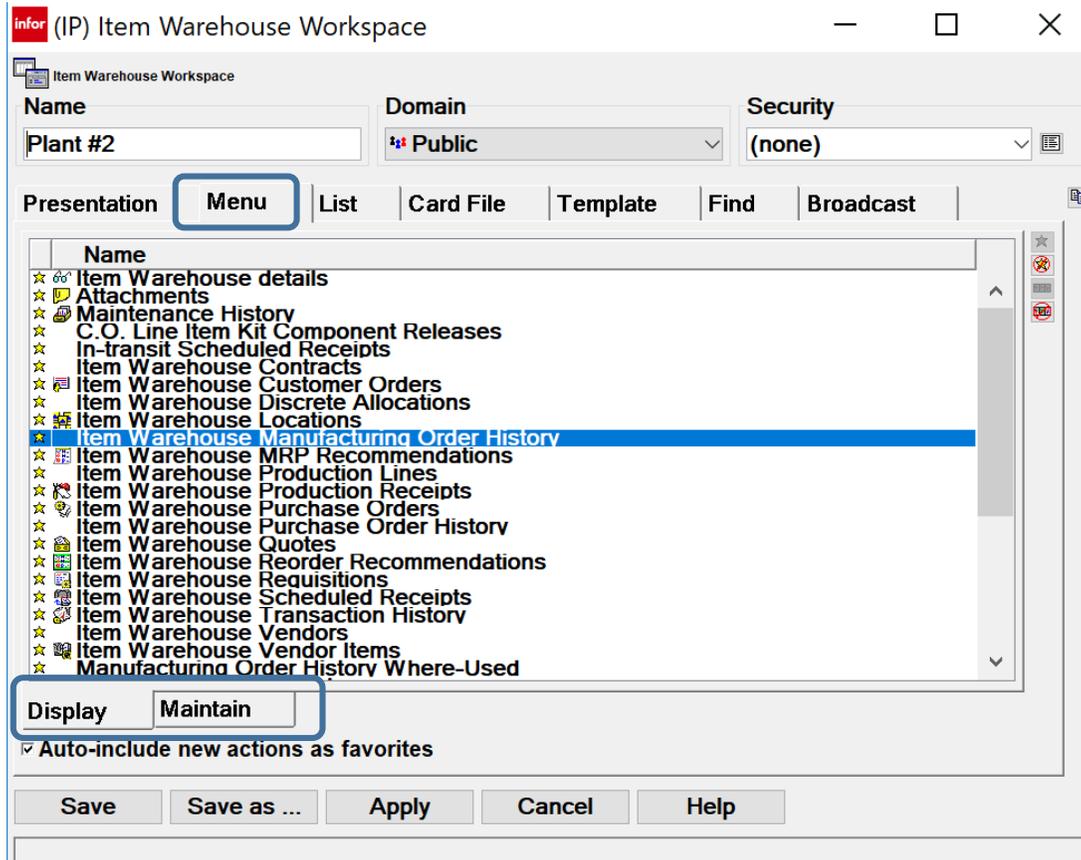
Scheme

Initial scheme: (none)

Save Save as ... Apply Cancel Help

- List Title becomes the Object Label
- Can specify the icon for the Object

# Workspaces – Menu Tab



- Use the 'Favorites' button to add or remove  options from the toolbar 
- Note that there are 2 tabs:
  - Display
  - Maintain

# Workspaces – List Tab

The screenshot shows the configuration window for an Infor Item Warehouse workspace. The title bar reads "infor (IP) Item Warehouse Workspace". The main area is divided into several sections:

- Name:** A text field containing "Plant #2".
- Domain:** A dropdown menu set to "Public".
- Security:** A dropdown menu set to "(none)".
- Navigation Tabs:** A row of tabs including "Presentation", "Menu", "List" (which is highlighted with a blue box), "Card File", "Template", "Find", and "Broadcast".
- Configuration List:** A table of settings for the "List" view:

Initial view	(preference)	▼	📄
Initial subset	(preference)	▼	📄
Initial sort	(preference)	▼	📄
Restricted by subset	(all records)	▼	📄
Open action	(preference)	▼	
<Alt> open action	(preference)	▼	
<Ctrl> open action	(preference)	▼	
- Buttons:** A row of buttons at the bottom: "Save", "Save as ...", "Apply", "Cancel", and "Help".

- Set the default view, subset & sort for the workspace
- Initial Subset – allows the user to change subsets
- Restricted by Subset – does not allow the user to change subsets
- Set the open actions

# Workspaces – Card file Tab

The screenshot shows the 'infor (IP) Item Warehouse Workspace' dialog box. The 'Name' field contains 'Plant #2', 'Domain' is set to 'Public', and 'Security' is '(none)'. The 'Card File' tab is selected and highlighted with a blue border. Below the tabs, there are three preference dropdowns: 'Initial selection' (preference), 'Initial card' (preference), and 'Tab style' (preference). At the bottom of the dialog are buttons for 'Save', 'Save as ...', 'Apply', 'Cancel', and 'Help'.

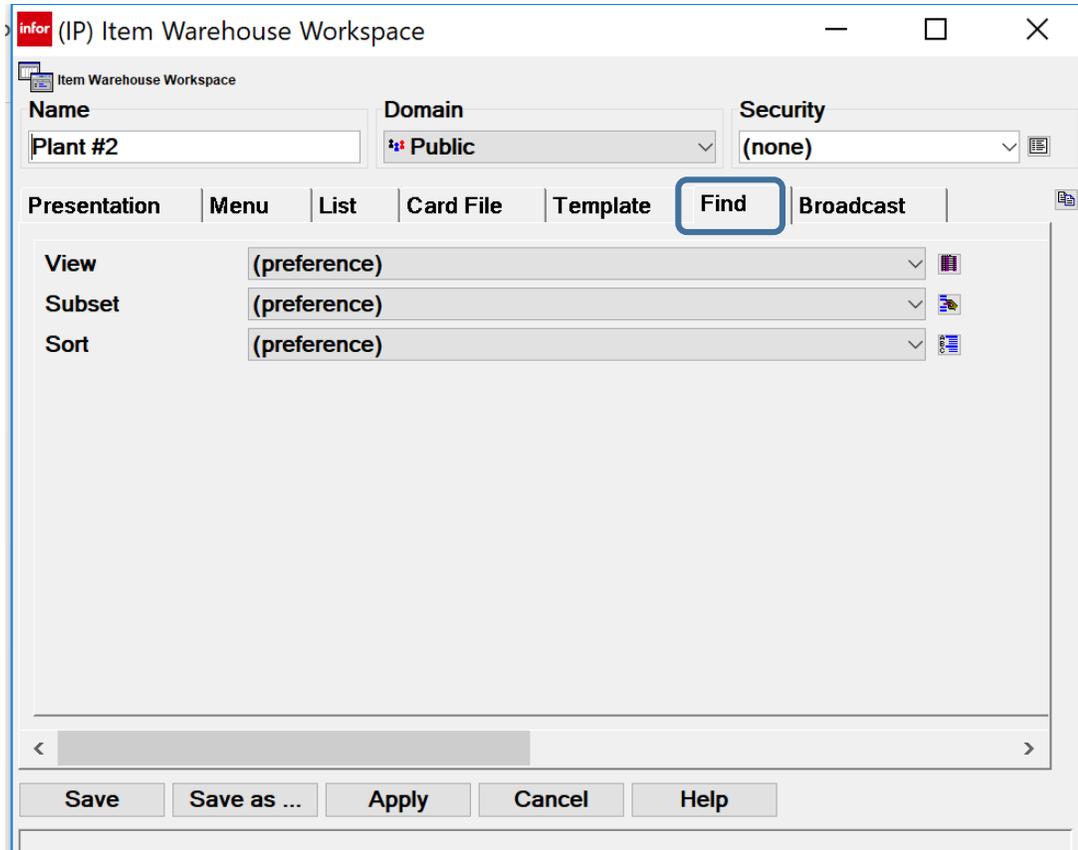
- Initial Selection
  - Sets the default Card File
- Initial Card
  - Sets the active Card when the Card File is opened
- Tab Style
  - Determines where the tabs are located

# Workspaces – Template Tab

The screenshot shows the 'Template' tab of the Infor (IP) Item Warehouse Workspace. The window title is '(IP) Item Warehouse Workspace'. The main area contains three sections: 'Create template', 'Copy template', and 'Change template', each with a dropdown menu set to '(preference)' and a small icon to its right. The 'Template' tab is highlighted with a blue border. At the bottom, there are buttons for 'Save', 'Save as ...', 'Apply', 'Cancel', and 'Help'. The top of the window shows fields for 'Name' (Plant #2), 'Domain' (Public), and 'Security' (none).

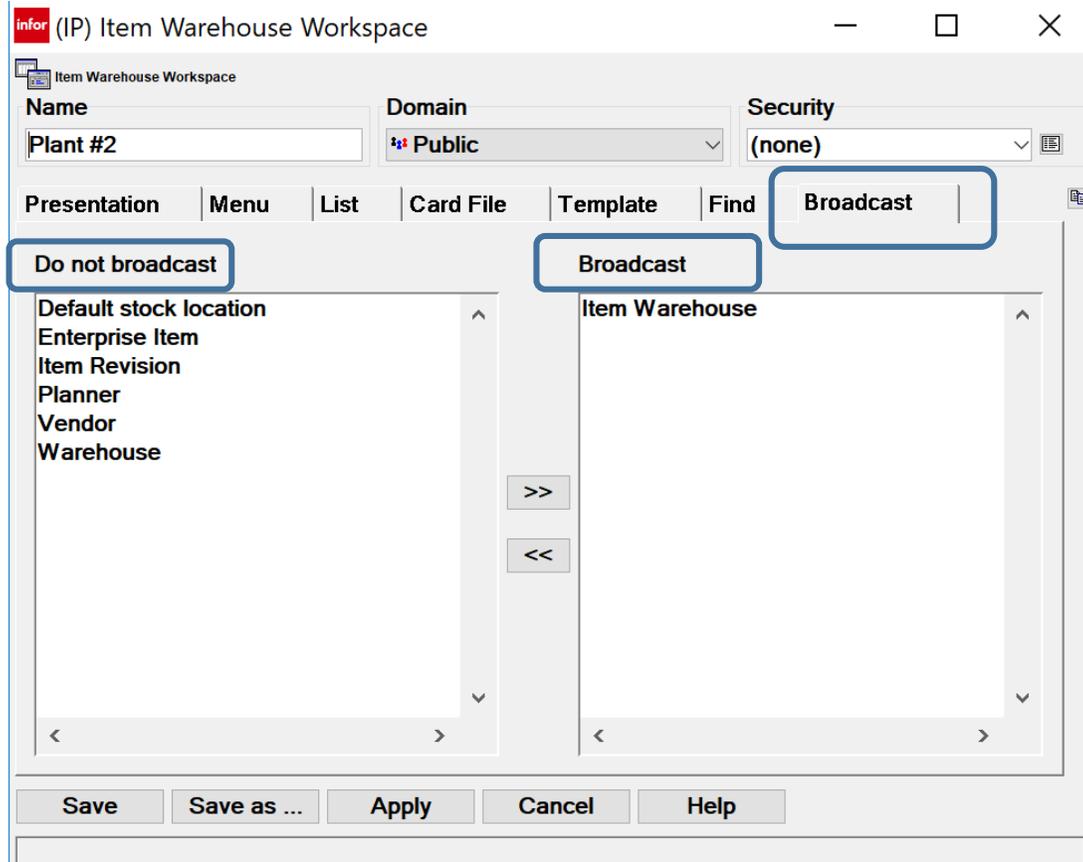
- Default templates for create, change and copy

# Workspaces – Find Tab



- Default view, subset and sort when bringing up the search for an item in the file
- In this example, it would be searching for an Item Warehouse record

# Workspaces – Broadcast Tab



- Files to use when creating a workbench
- If a file is not included in the 'Broadcast' window, add it from the 'Do Not Broadcast' window

# Presentation Schemes

# Presentation Schemes

- Presentation schemes can change either a specific field or an entire line within a view:
  - Change the characters to a different color
  - Can highlight with different colors
  - Bold
  - Italics
  - Bold Italic
- Schemes are created in the view
- A single scheme can have multiple criteria defined
  - The example on the next slide shows CO Item Releases
  - Past Due lines are shown in **Red**
  - Scheduled to ship in the next month are in **Green**
  - Future shipments are **Blue**

# Presentation Schemes

## C.O. Line Item Releases

Sch Ship	Early Ship	Order	M.O.	Custo...	Name	Rel	Cust Item	Item	Description	Ord	UM	Shipp.
08/27/2014		100047		963400	BELL - TEXT...	1	2431854-5...	2U04452-50...	ASSY BALL A...	1	EA	
08/21/2014		100046		963400	BELL - TEXT...	1	2U03345-...	2U03345-001	ASSY LMC VI...	2	EA	
09/26/2014		100041	M902130	151	Irvin Company	1	087-02060...	2U02495-002	ASSY NG CBL...	100	EA	
10/03/2014		100041		151	Irvin Company	2	087-02060...	2U02495-002	ASSY NG CBL...	200	EA	
11/14/2014		100041		151	Irvin Company	3	087-02060...	2U02495-002	ASSY NG CBL...	200	EA	
10/31/2014		100040	M902120	151	Irvin Company	1	G0C28032...	2U04468-001	ASSY LYCOM ...	100	EA	
08/22/2014		100039		1025500	VERICOR P...	1	901-375-6...	K3597	COVER CLAM...	10	EA	
11/28/2014		100038		1025500	VERICOR P...	1	77C96137...	2U03731-G0...	ESM HARNES...	2	EA	
10/24/2014		100037		968900	THE BOEIN...	1	70P86723...	2U02605-001	CBL ASSY JD...	100	EA	
08/29/2014		100035		1019900	Raytheon Co...	1	6637687-0...	2U03368-001	ASSY 16V CO...	12	EA	1
08/22/2014		100034		1019900	Raytheon Co...	1	A-TA1H50...	2U01706-001	CABLE ASSY, ...	18	EA	
08/29/2014		100033		914400	CADENCE D...	1	25000000...	2U03063-00...	ASSY,HIGH D...	1	EA	
12/30/2014		100032		963400	BELL - TEXT...	1	901-375-6...	9B05945-SK...	INS RECPT R...	400	EA	
09/19/2014		100031		968900	THE BOEIN...	1	70P86723...	2U02605-001	CBL ASSY JD...	210	EA	
08/29/2014		100030		914400	CADENCE D...	1	25000000...	2U03063-00...	ASSY,HIGH D...	1	EA	
08/29/2014		100029		1019900	Raytheon Co...	1	6637688-0...	2U03369-001	ASSY 8V CON...	19	EA	
12/12/2014		100028		963400	BELL - TEXT...	1	901-375-6...	K3597	COVER CLAM...	200	EA	
09/12/2014		100027		1004200	L-3 TELEME...	1	740-00484...	2X00133-003	CBL, ASSY M...	15	EA	
05/15/2015		100026		1025500	VERICOR P...	1	10-10190-...	2U04374-001	ASSY VERICO...	24	EA	
10/06/2014		100025		17400	NORTHROP ...	1	2271776-3	2U02598-003	CBL ASSY 176...	10	EA	

# Presentation Schemes

- Scheme for a full line

Item Warehouse View

Name: General Domain: Public Security: (none)

Presentation options

Scheme: (same as active workspace)

Available attributes

- Description
- 10 Character
- 1099 recipient (derived)
- 1st subdivision empty
- 20 Characters
- 2nd subdivision empty
- 3rd subdivision empty
- 4th subdivision empty
- 5th subdivision empty
- Abbreviation
- Account number (Item Revision Purch...)

All By Object

Selected attributes

Description	Column heading	Cursor	Label	Sup...	Statistics
Item	Item	No	Item	No	(none)
Warehouse	Whs	No	Ware...	No	(none)
Planner	Planner	No	Plan...	No	(none)
Primary vendor	Primary vendor	No	Prim...	No	(none)
Default stock location	Dflt stock loc	No	Defa...	No	(none)
Quantity on-hand	On-hand	No	Quan...	No	(none)
Stocking UM (Item Revision)	Stk UM	No	Stoc...	No	(none)
Total quantity on order	On order	No	Total	No	(none)

Save Save as ... Apply Cancel Help

- Scheme for a single field

(PG) View definition

Quantity on-hand: Numeric (9,999,999.999)

Column heading: On-hand

3 Number of decimals to display

Rounding method: Half adjust

Content: Value

Presentation width: 7

Column statistics: Total

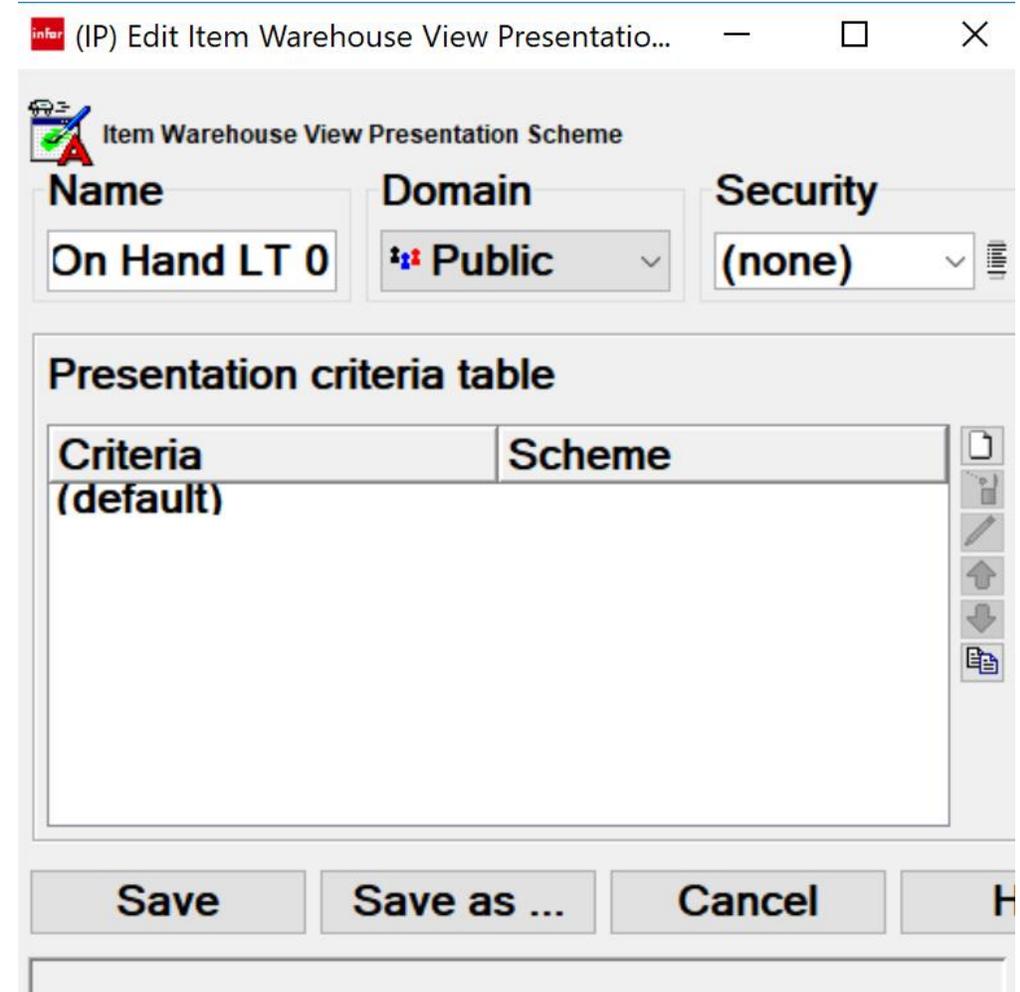
Scheme: (Same as view)

Presentation: Quick change

Continue Cancel Help

# Presentation schemes

- To create a scheme, click on the button to the right of the 'Scheme' field 
- A list of existing schemes will be displayed
  - Double click on 'New' to create a new scheme
- The Scheme will require a name
  - If there is multiple criteria to the scheme, each one will also require a name
  - Click on the 'Create' button on the right side to create scheme criteria



infor (IP) Edit Item Warehouse View Presentatio...

Item Warehouse View Presentation Scheme

Name Domain Security

On Hand LT 0 Public (none)

Presentation criteria table

Criteria	Scheme
Criteria (default)	

Save Save as ... Cancel

# Presentation Scheme criteria

- Select the field that will be used for the criteria
- Use subset criteria to define the condition that will cause the field/line to be highlighted

(IP) Edit Item Warehouse View Presentation Criteria

Item Warehouse View Presentation Criteria

Name

Available attributes

Description  
10 Character  
1099 recipient (derived)  
1st subdivision empty  
20 Characters  
2nd subdivision empty  
3rd subdivision empty  
4th subdivision empty

All By Object

Selected attributes

Descr...	Relatio...	Operand
----------	------------	---------

Criteria Options

Continue Cancel Help

(IP) Subset definition

Quantity on-hand

Numeric (9,9)

Relational operator

Equality  
Inequality

Greater than  
 Greater or equal  
 Less than  
 Less or equal

Operand type

Constant value  List  
 Field value  Range

Value

0.000

Logical operator

And  Or

Continue Cancel Help

# Presentation Scheme Options

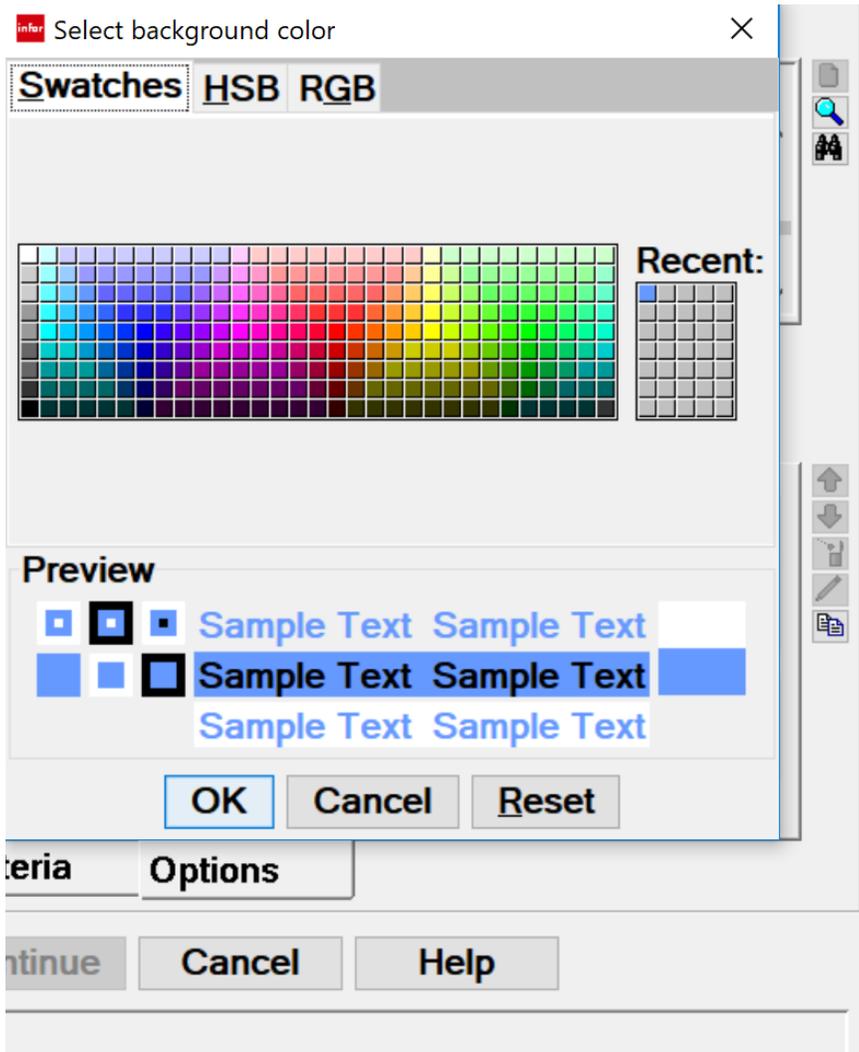
The screenshot shows a dialog box titled '(IP) Edit Item Warehouse View Presentation Criteria'. The 'Options' tab is active, displaying the following settings:

- Available attributes:** A list of attributes including Description, Quantity allocated (customer orders) - p..., Quantity allocated (production), Quantity issued this period, Quantity issued this year, Quantity on-hand, Quantity on-hand - planning (calculated), and Quantity on-hand at count.
- Selected attributes:** A list of selected attributes.
- Presentation:**
  - Colors: (sample)
  - Emphasis: Regular
- Navigation:**
  - Workspace: (none)

At the bottom, there are buttons for 'Continue', 'Cancel', and 'Help'.

- After the criteria/subset has been established, use the 'Options' tab to continue to define the scheme
- The buttons to the right of the 'Colors' field will allow for:
  - Foreground color – changes the text color
  - Background color – highlights the field/line
- Emphasis
  - Bold
  - Italic
  - Bold/Italic
- Workspace
  - Can define card file/card, etc. for the line

# Presentation scheme criteria



- Color grid allows you to select the desired color
- Preview will show what the scheme will look like

# Presentation Scheme Criteria

(IP) Edit Item Warehouse View Presentatio... — □ ×

Item Warehouse View Presentation Scheme

Name: On Hand LT 0    Domain: Public    Security: (none)

**Presentation criteria table**

Criteria	Scheme
(default) Neq on hand blue	(sample)

Save    Save as ...    Cancel    H

- Continue adding 'Criteria Schemes' using the same field or different fields

# Presentation Schemes

## C.O. Line Item Releases

Sch Ship	Early Ship	Order	M.O.	Custo...	Name	Rel	Cust Item	Item	Description	Ord	UM	Shipp.
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08/21/2014		100046		963400	BELL - TEXT...	1	2U03345-...	2U03345-001	ASSY LMC VI...	2	EA	
09/26/2014		100041	M902130	151	Irvin Company	1	087-02060...	2U02495-002	ASSY NG CBL...	100	EA	
10/03/2014		100041		151	Irvin Company	2	087-02060...	2U02495-002	ASSY NG CBL...	200	EA	
11/14/2014		100041		151	Irvin Company	3	087-02060...	2U02495-002	ASSY NG CBL...	200	EA	
10/31/2014		100040	M902120	151	Irvin Company	1	G0C28032...	2U04468-001	ASSY LYCOM ...	100	EA	
08/22/2014		100039		1025500	VERICOR P...	1	901-375-6...	K3597	COVER CLAM...	10	EA	
11/28/2014		100038		1025500	VERICOR P...	1	77C96137...	2U03731-G0...	ESM HARNES...	2	EA	
10/24/2014		100037		968900	THE BOEIN...	1	70P86723...	2U02605-001	CBL ASSY JD...	100	EA	
08/29/2014		100035		1019900	Raytheon Co...	1	6637687-0...	2U03368-001	ASSY 16V CO...	12	EA	1
08/22/2014		100034		1019900	Raytheon Co...	1	A-TA1H50...	2U01706-001	CABLE ASSY, ...	18	EA	
08/29/2014		100033		914400	CADENCE D...	1	25000000...	2U03063-00...	ASSY,HIGH D...	1	EA	
12/30/2014		100032		963400	BELL - TEXT...	1	901-375-6...	9B05945-SK...	INS RECPT R...	400	EA	
09/19/2014		100031		968900	THE BOEIN...	1	70P86723...	2U02605-001	CBL ASSY JD...	210	EA	
08/29/2014		100030		914400	CADENCE D...	1	25000000...	2U03063-00...	ASSY,HIGH D...	1	EA	
08/29/2014		100029		1019900	Raytheon Co...	1	6637688-0...	2U03369-001	ASSY 8V CON...	19	EA	
12/12/2014		100028		963400	BELL - TEXT...	1	901-375-6...	K3597	COVER CLAM...	200	EA	
09/12/2014		100027		1004200	L-3 TELEME...	1	740-00484...	2X00133-003	CBL, ASSY M...	15	EA	
05/15/2015		100026		1025500	VERICOR P...	1	10-10190-...	2U04374-001	ASSY VERICO...	24	EA	
10/06/2014		100025		17400	NORTHROP ...	1	2271776-3	2U02598-003	CBL ASSY 176...	10	EA	

# Presentation Scheme

- When saving, you must 'Save' first and then use the 'Apply' button 
- If you have a scheme in a field, the line scheme will not be used for that field
- In the example below, the scheme was for 'Quantity on hand less than zero'

File Display Maintain Customize Navigation Help

Conf Pre... (tempora... 

 Item Warehouses

Whs	Item	Description	Stk UM	On-hand
1	AABALLY	AABALLY	EA = E...	3,963.000
1	ABALLY	ABALLY	EA = E...	100.000
1	AFXMD	AF/X BODY	EA = E...	-1.000
1	AFX01CL	'64-'72 BODY GM DISC CONV(LA)	EA = E...	1.000
1	B-AFXCL	AFX FRONT CONV	EA = E...	21.000
1	B-AFXCLI	INSERT BOX	EA = E...	0.000
1	BC14N	LH CALIPER,NEW	EA = E...	0.000
1	BC15N	RH CALIPER,NEW	EA = E...	0.000
1	DESKTOP PC	CONFIGURED DESKTOP PC	EA = E...	0.000
1	FFB6026	GM LET FRNT ROW DISC BRAKE	EA = E...	21.000

# Quick Change

# Quick Change

- For a person who doesn't have access to 'Mass Change', the 'Quick Change' option is a valuable second option
- Quick Change builds a window with fields based on the View
- Quick Change can be used from a list (top toolbar) or on a list card (side toolbar)

# Quick Change View options

(IP) View definition ×

Default stock location Character (7A)

**Column heading**

Stock location

Suppress quick change

Position cursor

**Label** Default stock location

**Content** Value

**Visual control** Entry field

**Entry field width** 7

**Presentation** Quick change

**Continue** **Cancel** **Help**

- When adding a field to a view, there is a 'Quick Change' tab
- Use the 'Position Cursor' option to have the field being change the field that the cursor is in
- If there's a field in the view that you don't want displayed on the Quick Change window, click the 'Suppress quick change' option

# Change Template

(IP) Edit Item Warehouse Change Template

Item Warehouse Change Template

Name: Default Stk Loc Domain: Public Security: (none)

Options

Card file: (system default) Initial card: (system default)

Auto advance  Preview before update

Available attributes

Description

- Days / forecast period
- Days supply per order
- Default in-transit location
- Default in-transit warehouse
- Default inspection location
- Demand time fence
- Estimate annual usage

All By Object

Selected attributes

Description	Label	Default value
Default stock location	Default s...	01010

- If a field being changed is changed to a same value:
  - Create a Change Template
  - Check the 'Auto Advance' box in the Template and un-check the 'Preview before Update' option
  - Set the Change Template as the default in the Preference

# Quick change process

- Create a subset to display only the records to be changed
- Single click on the first record to be changed
- Click the Quick Change button
- Click either 'Update' or 'Bypass' to work your way through the records to be changed

(IP) Change Item Warehouse - 1, 1104

1104 SPEAKERS 1 MAIN WAREHOUSE

Template

Stk Loc

Default stock location 01011

Description SPEAKERS

Stocking UM EA = Each

Quantity on-hand 16,225.000

Quantity on-order (production) 0.000

Quantity on-order (purchase) 900.000

Quantity allocated (customer orders) 516.000

Quantity allocated (production) 0.000

On-hand cost 1,025,582.25

Auto advance

Preview before update

Update Bypass Cancel Help

# Export options

# Export a List

- **A list can be copied to an Excel Spreadsheet.** To copy a list:
- Click on “File” on the Menu Bar.
- Click on “Export” from the File dropdown list of options.
- Check:
  - ‘Clipboard’ (make sure that your default system preference has been set for a large clipboard)
  - ‘File’ option will copy directly to a spreadsheet
  - Suppress Padding (removes ‘null’ characters from all fields so you don’t have to do a ‘Trim’ command in Excel to create a pivot table or V-Lookup)
- Open Excel.
- Paste. The data from Mapics will be passed into the spreadsheet.
- **Note:** If all of the records do not copy, Mapics will display an Error window. To increase the size of the clipboard go to the Main PowerLink Card File. Click on “Customize” and then “Preferences”.
  - From the Miscellaneous card, increase the capacity of the clipboard.

# Exporting data

- From the 'File' option on the menu bar, select 'Export'

Infor (IP) Item Warehouses

File Display Maintain Customize Navigation Help

Refresh F5  
Calculate Column Statistics  
Host Jobs ...  
**Export ...**  
Send to...  
Local Print ...  
Status  
Summary Info ...  
Close

Item	Description	Stk UM	On-hand
1	MPA302	EA = Each	3,963.000
1	NPY8222DKSILFUM	EA = Each	100.000
1	SLX120PWC	EA = Each	-1.000
1	SN1000	EA = Each	1.000
1	VS30.63AB	EA = Each	21.000
1	055553	EA = Each	21.000
1	1000	EA = Each	21.000
1	1000OC	EA = Each	21.000
1	1001	EA = Each	21.000
1	MPA302	EA = Each	9,999,999.999
1	Yarn 8222 Dark Silver 2000/fz	LB = Pounds	10.000
1	SLX 120HP POLARIS MARINE PWC	EA = Each	40.000
1	Serial Number Item	EA = Each	106.000
1	Vista Shag Dk Silver Action Bk	SY = Sq Yard	6,493.330
1	Socle Saillie P17 IP44 16A ACH	EA = Each	-1.000
1	PC, 166 MHZ, DESKTOP	EA = Each	106.000
1	BRICKS	EA = Each	10,000.000
1	PC. 900 MHZ. DESKTOP	EA = Each	14,710.000

# Exporting data

(IP) Export

**Media**

Clipboard  File

File name

.\

**Options**

Output Format  Text  HTML  PDF

Preserve column widths

Auto-size column widths

Suppress padding

Suppress digit grouping

Use line feed (LF)

Export selection only

Page Format

Continue Cancel Report Help

- Can copy to either your clipboard or send directly to a file
  - System preferences determine the size of your clipboard
- Suppress Padding removes 'null' characters from all fields so you don't have to do a 'Trim' command in Excel to create a pivot table or V-Lookup

# Summary

- PowerLink is a powerful tool that companies don't take full advantage of
- Using functions such as Preferences, Quick Change, Export, etc. will increase efficiency of accessing data and will replace many custom reports/queries
- Thank you for attending